Using Categories to Customize Archiving Retention of Emails

Understanding Categories

When you assign a category to an item, the item is displayed in the color of the category. Categories help you to quickly organize items in groups.

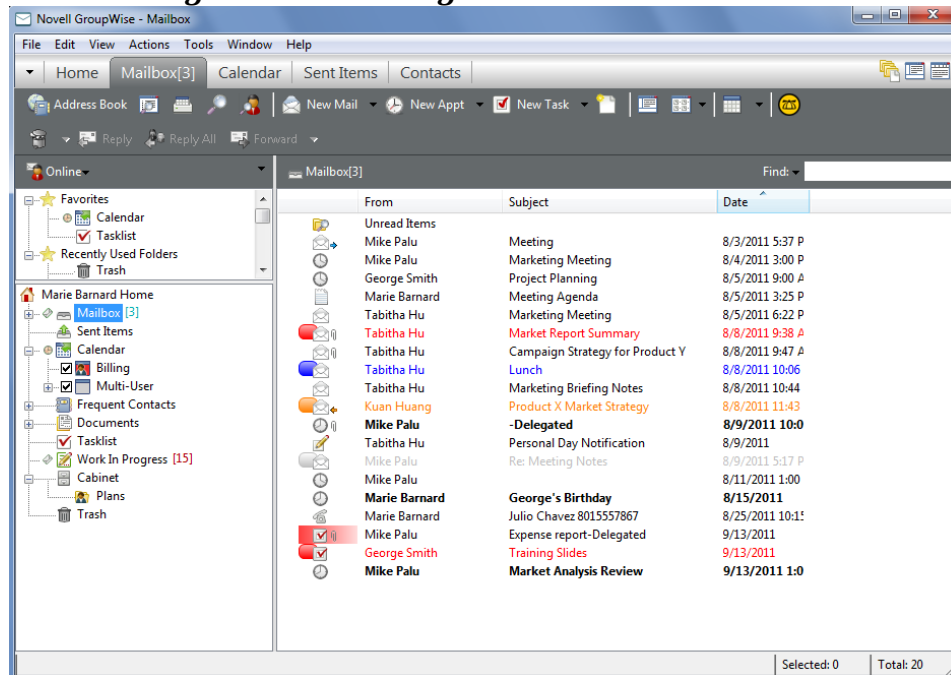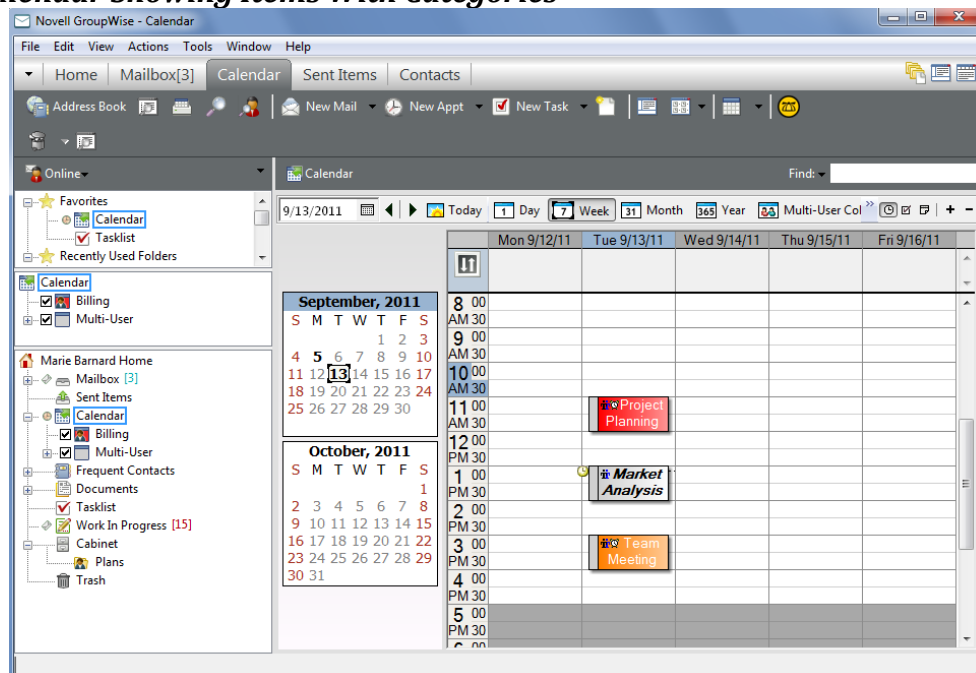*Figure 2-1 Mailbox Showing Items With Categories*

Figure 2-2 Calendar Showing Items With Categories

Four default categories (Follow-Up, Low Priority, Personal, and Urgent) are available for you to immediately assign to items. You can modify and delete them if you choose, as well as create new

categories.

If you assign one of the default categories (Follow-Up, Low Priority, Personal, and Urgent) to an item you are sending, the item arrives in the recipient's Mailbox with that category assigned. If you assign a category that you created to an item you are sending, the item arrives in the recipient's Mailbox with no category assigned.
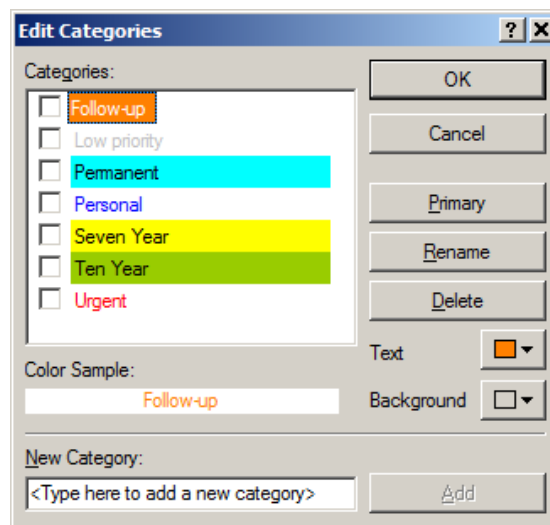
Adding a New Category
1 Click *Actions > Categories > More* to display the Edit Categories dialog box.

Note: If you want to increase the time that an e-mail is retained past the default time assigned to your mailbox, you need to add the following categories:

> **Seven Year**
> **Ten Year**
> **Permanent**
>
> Note: The names must be spelled exactly as shown above. You can add the colors as shown or choose your own colors.

2 Type the category name in the *New Category* field at the bottom of the Edit Categories dialog box.
3 Click *Add*. The *Add* button becomes active when you begin typing a category name.
4 To assign a color to a category, select the category name in the list, then select the text and background colors.
5 Click *OK* to save the new category.
TIP: You can also select an item before creating the new category, then immediately assign the new category to the selected item.

Renaming a Category
1 Click *Actions > Categories > More* to display the Edit Categories dialog box.
2 Select the category name, then click *Rename*.
3 Type the new name, then click *OK*.

The category is renamed in the list, and for all the items to which it was assigned.

Finding Items by Category in a Folder
1 In the upper right corner of any folder, click *Find > Categories*, then click the category name. All items that have been assigned this category are displayed.
2 To clear this selection, click.

Sorting Items by Category
1 Add a *Category* column to the folder Item List, as described here:

> ### Adding a Column
> **1** Right-click the column header.
> **2** Click a column you want to add.
> or
> Click *More Columns*.
> > **2a** In the *Available columns* list, select one or more columns, then click *Add*.
> > **2b** Use *Up* and *Down* to position the new columns relative to the existing columns.
> **2c** Click *OK*.
>
> ### Sorting by a Column
> **1** Click the folder containing the items you want to sort.
> **2** Click *View > Display Settings > Sort*.

2 Click the *Category* column to sort the Item List by category.

Deleting a Category
1 Click *Actions > Categories > More* to display the Edit Categories dialog box.
2 Select the category name, then click *Delete*.
3 Click *Yes*, then click *OK*.

The category is removed from the list, and from all the items to which it was assigned.

Assigning a Category Quickly
In any Item List:
1 Click the item icon.
2 Click a category in the drop-down list.
or
If the category you want isn't listed, click *More* to display the Edit Categories dialog box, select the category, then click *OK*. The 10 most recently used categories are listed. (If you have not yet used categories, they are displayed alphabetically.)

Assigning Any Category to Any Item Type
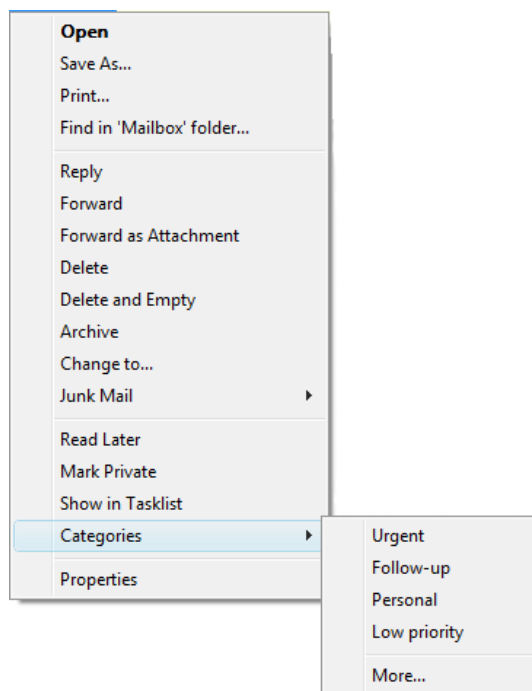To assign a category to a message, appointment, task, note, or contact:
1 Right-click the item.
2 Click *Categories*.

3 Click a category in the drop-down list.
or
If the category you want isn't listed, click *More* to display the Edit Categories dialog box, select the category, then click *OK*.

The 10 most recently used categories are listed. (If you have not yet used categories, they are displayed alphabetically.)

To assign a category to an address book entry:
1 Open a personal address book.
2 Locate the user you want.
3 Right-click the user.
4 Click *Details*, then click *Categories*.
5 Click a category in the menu, then click *OK*.

Assigning a Category by Using Item Properties
1 Open an existing item, click the *Personalize* tab, then click *Edit Categories*.
or
Open a new item to compose, click the *Send Options* tab, then click *Edit Categories*.
If you assign one of the default categories (Follow-Up, Low Priority, Personal, and Urgent) to an item you are sending, the item arrives in the recipient's Mailbox with that category assigned. If you assign a category that you created to an item you are sending, the item arrives in the recipient's Mailbox with no category assigned.
2 In the Edit Categories dialog box, select a category, then click *OK*.

Removing a Category from an Item
1 Right-click the item.
2 Click *Categories > More* to display the Edit Categories dialog box
3 Deselect the category to remove, then click *OK*.
The category is removed from the item.